



Nexus Notes

April 15, 2013

Friends,

Some of you may know that I am in the midst of training for the San Diego Marathon which will be held on June 2nd of this year. Depending on the day, I may do a long endurance run, a fast, shorter tempo run, or a slow recovery run. I mention this because of a surprise I had during a recent trip to the gym for a cycling class. The cycling teacher has been a friend for quite a number of years. Just as class was about to begin, she walked up to me and asked me what type of workout I would like: Endurance or intervals. I must admit that she took me by surprise and I asked her what prompted her to check with me. She responded that she wanted to teach a class that would best account for the type of run I had done the previous day.

Communication: I'm sharing this story with you because I found that it illustrated the benefit of knowing someone's situation more deeply. Yes, she had prepared a specific workout for that morning's class, but, because we chat often, she knew that I was training for a marathon and she was familiar with the different types of runs that can occur during training. She also knew that the type of run I had done the previous day might impact the type of workout I could do. However, by adjusting the workout to my benefit, she did not short-change anyone else in the room. It just wouldn't have been tailored to what anyone else might have done the day before.

Headlines: I'm sure more than a few of you are familiar with Money magazine or the CNBC financial channel. They, like other financial outlets, provide very good information about financial topics. Headlines like, "What stock to buy now" and "What to do with that tax refund" are familiar ones. The stories behind these headlines are targeted at a large audience—not unlike the cycling class. Is it possible that the suggestions could be just right for someone reading or watching? Absolutely. However, having someone familiar with your unique situation can help you achieve your specific financial goals more efficiently. This is why I meet with clients at least once a year. I need to know about any changes to your personal situation, financial or otherwise. I also encourage you to contact me at any time regarding any changes that may occur in between. I want to tailor a financial cycling class just for you.

P.S. As I was completing this newsletter, I learned of the horrific bombings at the Boston Marathon. One friend was running it and she reported via Facebook that she was fine. She had finished quite a while before the bombs went off. My prayers go out to those affected and their families.

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